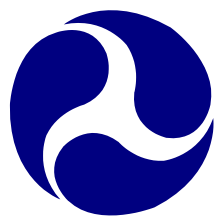


TEAM-Web User Guide

Chapter 2 ***Retrieving Records***

By:
ActionNet

Version: 2.03
Date: 02/11/2011



Chapter 2 Change History

| Version | Date | Description | Change By |
|---------|------------|--|--------------------------------|
| 1.0 | 09/26/2007 | Initial Online Versions and updates | Travis Klein |
| 1.1 | 10/18/2005 | Formatting Changes and Updates | Travis Klein, Sonya Ransome |
| 2.0 | 04/23/2007 | Major Formatting Changes and updates as required | Travis Klein |
| 2.01 | 02/27/2008 | Minor formatting and content updates | Travis Klein, Patty String |
| 2.02 | 11/02/2010 | Update Figure 11 for DBE 5.0 Release | Mei Sum Lee(Yvonne) |
| 2.03 | 02/10/2011 | Minor content update | Mei Sum Lee(Yvonne) |

** Note: previous versions of the online User Guide may have been updated as needed without consistent versioning. Some previous change versions may be omitted or estimated. Versioning shall be consistent henceforth.*



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Chapter 2: Retrieving Records

Overview

This chapter explains how to retrieve information about Recipients, Applications, and Projects from the TEAM-Web system.

Access Recipient Information

Follow these steps to retrieve Recipient data:

1. From the Main Menu, click on **Recipients**. The **Query Recipients** page will appear.
2. Enter the search criteria. The more search criteria you enter, the more specific your search results will be.
3. Click on the **Submit Query** button. The **Recipient Query Results** page will appear.

Recipient Query Results Page

The **Recipient Query Results** page displays summary information for each Recipient queried through the Query Recipients functionality described above.

If your search has returned several results the system will default to selecting the first item, but you may choose the Recipient for which you would like to see specific Recipient information. To do so, highlight the name of the Recipient within the Results box by clicking on some of the words or numbers within that Recipient ID record line. The selected item will highlight blue.

The selected Recipient information will display in the **Recipient Details** portion at the bottom of the screen.



Recipient Query Results: Use this button to manually Re-query the database based on the search criteria you entered in the Query Recipients box. This button will be further discussed in subsequent chapters.

Next : If your search result yields multiple pages of information, use the Next button to display the list of Recipients, page by page. When not on the first page, use the **Previous** button to previous pages.

Query Results Table: Identifies the Recipient information retrieved from the database using your search criteria.

Recipient Information: Displays the contact information for the Recipient you have highlighted.

The screenshot shows the TEAM-Web (Quality Assurance Database) interface in Microsoft Internet Explorer. The left sidebar contains a Main Menu with options: Recipients, Applications, Review and Approval, Execution, Project Management, Funds Control, Funding Adjustments, Civil Rights, TEAM Administration, Dynamic Query, Help Desk Information, and Exit. The main content area displays the 'Recipient Query Results' table with columns: ID, Recipient, City, State, and Cost Center. The table lists various recipients, with the first row highlighted. Below the table is the 'Recipient Details' form, which includes fields for Recipient ID, Recipient Name, Address, City Name, State, Zip, Phone, Ext, Fax, and Internet Address. A paper clip icon (attach button) is located at the top right of the form.

| ID | Recipient | City | State | Cost Center |
|------|---|-------------|-------|-------------|
| 728 | THIS VENDOR TO BE SELECTED BY COMPETETIVE BID | CITY NAME | ST | 62000 |
| 1000 | ALABAMA DEPARTMENT OF TRANSPORTATION | MONTGOMERY | AL | 78400 |
| 1001 | FLORIDA DEPARTMENT OF TRANSPORTATION | TALLAHASSEE | FL | 78400 |
| 1002 | GEORGIA DEPT. OF TRANSPORTATION - OFFICE OF INTERMODAL PROGRAMS | ATLANTA | GA | 78400 |
| 1003 | KENTUCKY TRANSPORTATION CABINET | FRANKFORT | KY | 78400 |
| 1005 | NORTH CAROLINA DEPARTMENT OF TRANSPORTATION | RALEIGH | NC | 78400 |
| 1006 | SOUTH CAROLINA DEPARTMENT OF TRANSPORTATION | COLUMBIA | SC | 78400 |
| 1007 | TENNESSEE DEPARTMENT OF TRANSPORTATION | NASHVILLE | TN | 78400 |
| 1009 | MISSISSIPPI DEPARTMENT OF TRANSPORTATION | JACKSON | MS | 78400 |
| 1011 | CITY OF COLUMBIA | COLUMBIA | SC | 78400 |
| 1016 | CITY OF GADSDEN | GADSDEN | AL | 78400 |
| 1019 | CITY OF MONTGOMERY -Montgomery | MONTGOMERY | AL | 78400 |

Recipient Details

Recipient ID: 728

Recipient Name: THIS VENDOR TO BE SELECTED BY COMPETETIVE BID

Address: STREET ADDRESS

CITY NAME: CITY NAME ST: 20590 - 0

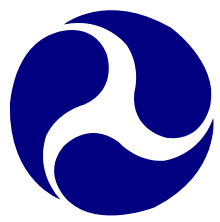
Phone: 000-000-0000 Ext: 00000 Fax: 000-000-0000

Internet Address:

Figure 1

Attach Additional Files

1. To attach any additional information which cannot be filled in the form, use the **attach button** (paper clip icon) on top of the menu bar
2. When you click the **attach button** a new window will pop up with a list of folders. Select the folder according to the subject of the attachment.



3. Once the required folder is selected, enter a Description and then either type in the complete name of the file (including the path) to be attached or click **Browse** to locate and input the exact path of the file.
4. Click the "Upload" button to attach the file

Note: for more details on attachments, see Appendix F

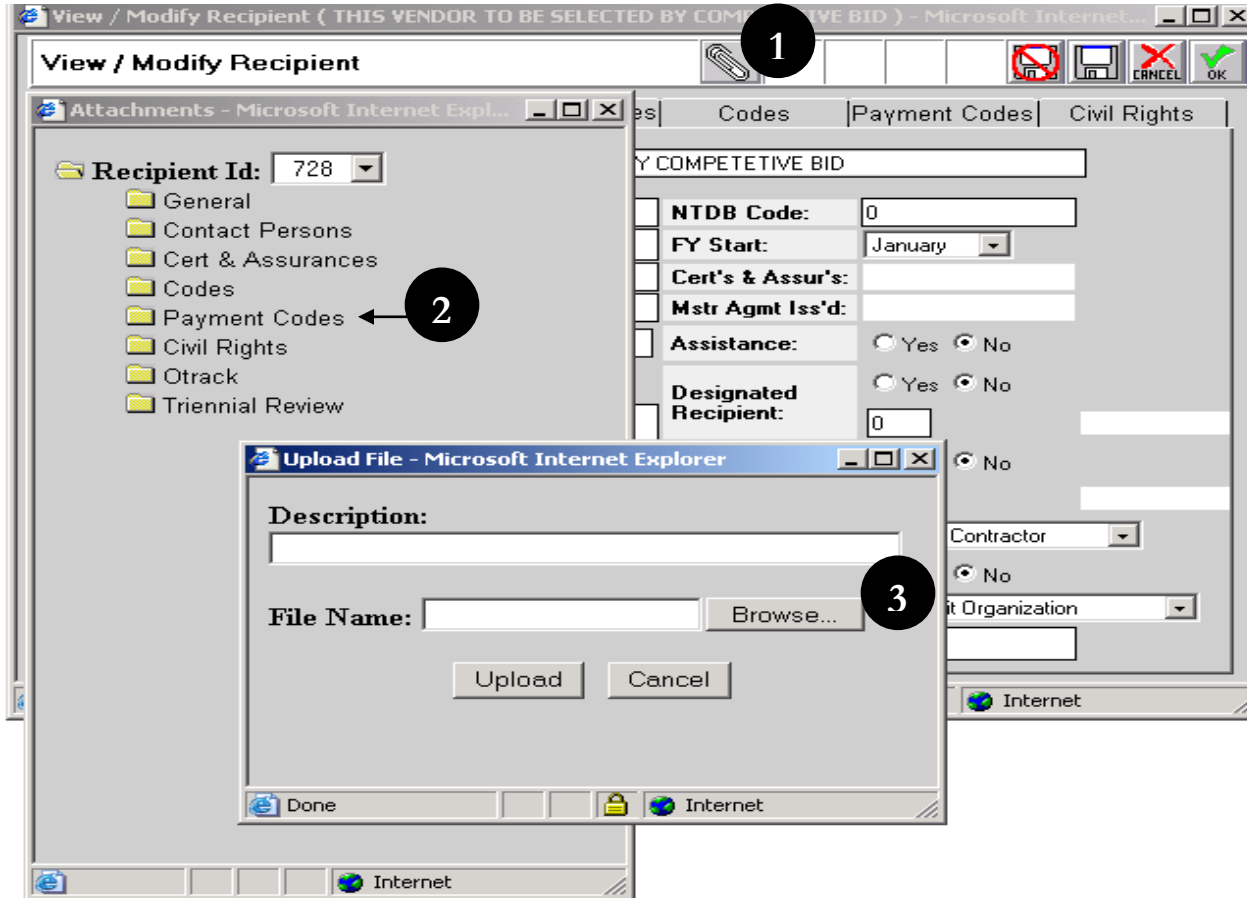


Figure 2



Modify Recipient

View/Modify Recipient

To View/Modify Recipient Information, follow the query instructions stated on the previous pages and click on View/Modify Recipient from the Main Menu Bar as illustrated in Figure 3.

The screenshot displays the TEAM-Web (Quality Assurance Database) interface in Microsoft Internet Explorer. The main window is titled "Recipient Query Results" and shows a "View / Modify Recipient" form for organization 728. The form is divided into several tabs: General, Contact Persons, Cert's & Assurances, Codes, Payment Codes, and Civil Rights. The "General" tab is active, showing fields for Organization, Acronym, Street, City/State/Zip, Phone Number, Fax Number, Internet Address, Cost Center, Geog. Location, Last Updated, Active status, DBE status, NTDB Code, FY Start, Cert's & Assurances, Mstr Agmt Iss'd, Assistance, Designated Recipient, MPO, Type, State DOT, OST Type, and DUNS Number. The left sidebar shows the Main Menu with "View/Modify Recipient" highlighted. The bottom status bar shows the user is logged in as "1016" and the system is running on "Internet".

| ID | Recipient | City | State | Cost Center |
|-----|---|------|-------|-------------|
| 728 | THIS VENDOR TO BE SELECTED BY COMPETITIVE BID | | | |

View / Modify Recipient

General | Contact Persons | Cert's & Assurances | Codes | Payment Codes | Civil Rights

Organization: 728 THIS VENDOR TO BE SELECTED BY COMPETITIVE BID

Acronym: TO BE SELECTED **NTDB Code:** 0

Street: STREET ADDRESS **FY Start:** January

City/State/Zip: CITY NAME ST 20590 0 **Cert's & Assur's:**

Phone Number: 0000000000 x 00000 **Mstr Agmt Iss'd:**

Fax Number: 0000000000 **Assistance:** ☐ Yes ☒ No

Internet Addr.: **Designated Recipient:** 0 ☐ Yes ☒ No

Cost Center: 62000 **MPO:** 0 ☐ Yes ☒ No

Geog. Location: **Type:** Private, Contractor

Last Updated: 12/17/2003 **State DOT:** ☐ Yes ☒ No

Active: ☒ Yes ☐ No **OST Type:** For Profit Organization

DBE: ☐ Yes ☒ No **DUNS Number:**

Figure 3



General Tab

Note: Only FTA users are allowed to make changes to the fields on General tab. Read only for grantees.

The **View/Modify Recipient** window has six tabs (see Figure 4). When opened, the system defaults to the General tab, which displays detailed data about the selected Recipient. Below are some common tasks that you may need to perform:

- To **update** the entry fields, place the cursor in the appropriate entry field and type in the new information. (Entry fields are white text boxes with a black border, and include fields for the Recipient's street address, phone number, and Internet address.)
- To **save** the new data and close the screen, click on the OK icon (green "OK" checkmark).
- To **return to the previous** data and close the screen, click on the Cancel icon (red "X" mark).



View / Modify Recipient (THIS VENDOR TO BE SELECTED BY COMPETITIVE BID) - Microsoft Internet...

View / Modify Recipient

General | Contact Persons | Cert's & Assurances | Codes | Payment Codes | Civil Rights

Organization: 728 THIS VENDOR TO BE SELECTED BY COMPETITIVE BID

Acronym: TO BE SELECTED NTDB Code: 0

Street: STREET ADDRESS FY Start: January

City/State/Zip: CITY NAME ST 20590 0 Assistance: ☐ Yes ☒ No

Phone Number: 0000000000 x 00000 Designated Recipient: ☐ Yes ☒ No

Fax Number: 0000000000

Internet Addr.: MPD: ☐ Yes ☒ No

Cost Center: 62000 Type: Private, Contractor

Geog. Location: State DOT: ☐ Yes ☒ No

Last Updated: 12/17/2003 OST Type: For Profit Organization

Active: ☒ Yes ☐ No DUNS Number:

DBE: ☒ Yes ☐ No

Figure 4

Contact Persons Tab

1. Click on the **Contact Persons** tab to update information concerning the Recipient's Officers and participating Unions (See Figure 5).
2. When you select **Officer Titles** from the dropdown menu, names and titles of the Recipient's officers will be displayed in the table.
 - a. To display information about an **Officer**, click on the Officer's name. The fields to the right of the table will become populated with that Officer's contact information. (Continue to Figure 6 illustration)



Figure 5 shows the 'View / Modify Recipient' interface for 'BUTTE-SILVERBOW, CITY OF'. The interface is divided into two main windows. The left window shows a list of officer titles with a dropdown menu open, displaying options like 'ADMINISTRATOR', 'CHAIRMAN OF THE BOARD', 'CHIEF EXECUTIVE OFFICER', 'CITY MANAGER', 'COMMISSIONER', 'COUNTY EXECUTIVE', and 'DIRECTOR'. A callout '1' points to the title list, and '2' points to the 'CHAIRMAN OF THE BOARD' title. The right window shows the same title list with a callout '2a' pointing to the 'CHAIRMAN OF THE BOARD' title. The right window also has a form for entering contact information (Last Name, First Name/Initial, Street, City/State, Phone, Alternate Phone, Fax Number, Email, Website) and a 'Contact For' section with checkboxes for various roles like CEO, Grants, MPO, EEO, DBE, Title VI, 504, Echo, and General FTA Issues.

Figure 5

- b. The Recipient may add new titles by selecting **Add New Title** at the bottom of the list. When the dialog box appears, enter the new title. Click on the OK icon.
- c. The Recipient may also add a name to any title by selecting the “**Add New**” line below the title and typing the name in the entry fields to the right.
- d. To update previously entered information, select the person’s name in the table and make changes in the entry fields to the right.



- e. To retain changes, click on the Save icon.
- f. To delete changes, click on the Discard icon.

2b

2c

2d

Figure 6

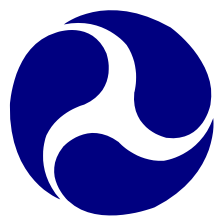
2e

2f

2d

Changes may be made to the Data fields here.

3. When you select **Unions** from the dropdown list (see Figure 7), names of the unions and their contact persons are displayed.
NOTE: All Recipients must ensure that the information displayed is correct and update it to maintain accuracy.
 - a. If there are no unions, enter that information in the first field to the right. The “Last Name” field must be populated to save a new Contact record.
 - b. To add new Unions to this list, click in the **Add New Union** field at the bottom of the list, or click on the **ADD** icon. When the dialog box appears, type in the name of the new Union. Click on the OK icon.
 - c. To add the name of a Union’s contact person, select the **Add New** line below the Union name and type in that name in the entry fields to the right.



- d. To update previously entered information, select the person's name in the table and make changes in the entry fields.
4. Click on the **OK** or Cancel icon to retain or delete your changes.

Figure 7

Cert's and Assurances Tab

This window permits users to review the current status of a Recipient's annual certifications and assurances. To access the text of a specific certification or assurance, click on the yellow icon in the row that contains that certification or assurance.



If no certification date appears in the “**Cert Date**” fields, the Recipient’s authorized official and attorney must electronically attest to the appropriate certifications and assurances by pinning the Certification Agreement on this window. (NOTE: In some cases, the Recipient’s authorized official may pin the document on behalf of the attorney.) See Figure 8 for an example.

| Cat | Description | Applicable | N/A | Cert Date | Text |
|-----|---------------------------------------|--------------------------|--------------------------|-----------|------|
| 01 | REQUIRED OF EACH APPLICANT | <input type="checkbox"/> | <input type="checkbox"/> | | |
| 02 | LOBBYING | <input type="checkbox"/> | <input type="checkbox"/> | | |
| 03 | PRIVATE MASS TRANSPORTATION COMPANIES | <input type="checkbox"/> | <input type="checkbox"/> | | |
| 04 | PUBLIC HEARING | <input type="checkbox"/> | <input type="checkbox"/> | | |
| 05 | ACQUISITION OF POLLING STOCK | <input type="checkbox"/> | <input type="checkbox"/> | | |

Affirmation of Certifications and Assurances

FEDERAL FY 2004 CERTIFICATIONS AND ASSURANCES FOR FTA ASSISTANCE

AFFIRMATION OF APPLICANT

Name of Applicant: THIS VENDOR TO BE SELECTED BY COMPETITIVE BID

Name and Relationship of Authorized Representative:

Official's Name: PIN: **CERTIFY**

Attorney's Name:

Figure 8

Codes Tab

- **Urbanized Areas Table:** This table lists all the Urbanized Areas by name and ID that apply to this Recipient. It is a read-only table for all, but a select number of FTA users.
- **Standard Metropolitan Statistical Area Codes Table:** A Recipient with the proper authority may add new SMSA codes.



- **Congressional Districts Table:** Recipients may add districts to this table with a State ID number and a District Code number.

The screenshot shows a web application window titled "View / Modify Recipient (THIS VENDOR TO BE SELECTED BY COMPETITIVE BID) - Microsoft Internet...". The window has a toolbar with icons for "ADD", "DELETE", "CANCEL", and "OK". Below the toolbar are tabs for "General", "Contact Persons", "Cert's & Assurances", "Codes", "Payment Codes", and "Civil Rights". The "Codes" tab is selected, displaying three tables:

| Urbanized Areas | |
|-----------------|----------------------|
| ID | Name |
| 110080 | WASHINGTON, DC-VA-MD |
| 000000 | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

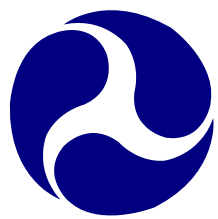
| SMSA Codes |
|------------|
| Code |
| 8840 |
| 0000 |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |

| Congressional Districts | |
|-------------------------|---------------|
| State ID | District Code |
| 11 | 00 |
| 00 | 00 |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Figure 9

Payment Codes Tab

This window displays the method of payment FTA will use and the Recipient's Electronic Clearing House Operations (ECHO) control numbers used by FTA for internal accounting purposes. See Figure 10 below.



View / Modify Recipient (THIS VENDOR TO BE SELECTED BY COMPETITIVE BID) - Microsoft Internet...

View / Modify Recipient

General | Contact Persons | Cert's & Assurances | Codes | Payment Codes | Civil Rights

Organization: 728 THIS VENDOR TO BE SELECTED BY COMPETITIVE BID

REQU ? ☐ Yes ☒ No

OPAC ? ☐ Yes ☒ No

WCF ? ☐ Yes ☒ No

TSC ? ☐ Yes ☒ No

| ECHO Numbers |
|--------------|
| 00000000 |
| |
| |
| |
| |
| |
| |
| |
| |
| |

javascript:selectTab(5) Internet

Figure 10

Civil Rights Tab

This read-only page (see Figure 11) displays information entered by FTA staff reflecting FTA's understanding of the Recipient's status with respect to various **Civil Rights requirements**, including **EEO Program**(hiring or minorities and women), **Title VI Program**(nondiscrimination in project benefits), **DBE Program** (participation by disadvantaged business enterprise), and **DBE**



Goals. (Omitted from this Civil Rights tab page is information pertaining to the Recipient's status with respect to the Americans with Disabilities Act (ADA) requirements.)

If the term “**Approved**” is missing from any “Status” field, the Recipient must contact a Civil Rights officer to discuss the matter.

View / Modify Recipient (WESTERN RESERVE TRANSIT AUTHORITY) - Windows Intern...

View / Modify Recipient

General Contact Persons Cert's & Assurances Codes Payment Codes Civil Rights

Organization: 1234 WESTERN RESERVE TRANSIT AUTHORITY

| Programs | Status | Submission | Approval | Expiration |
|-------------------|--------------------|------------|-----------|------------|
| EEO Program: | Pending | 7/11/2007 | | 7/11/2010 |
| Title VI Program: | Approved | 2/28/2010 | 8/14/2008 | 6/20/2010 |
| DBE Program: | Approved | 1/1/2011 | 1/1/1999 | 9/1/1999 |
| DBE Goals: | No Finding Entered | 1/1/2011 | 1/1/2011 | 1/2/2011 |

| DBE Goal Values: | FY | Cycle Group | Race Conscious | Race Neutral | Overall Goal |
|------------------|------|-------------|----------------|--------------|--------------|
| | 2012 | Group 3 | 12.00% | 14.00% | 26.00% |

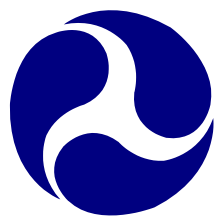
Notes:

DBE goal for FY'01 under review(JP). DBE goal for FY02 submitted 1/9/02. Goal:4.2%; DBE goal for FY03 submitted 1/9/02. Goal:4.2%;

Local intranet 100%

Figure 11

NOTE: The term “Approved”, appearing in any window, merely reflects FTA’s belief that there are no apparent, significant deficiencies in the Recipient’s compliance with the given requirements. FTA reserves the right to rescind the “Approved” designation (or other designation) if circumstances so demand.



Access Applications

See Figure 12 Below:

1. To query applications, click on the word **Applications** from the Main Menu. The **Query Applications** page will appear. **Note:** Clicking on the plus sign next to the word Applications instead of clicking directly on Applications will also expand the sub-menu but will not bring up the Query Applications page. To query an Application, you must click directly on the word “Applications.”
2. Query by any or all of the following search criteria: Year, Active/Closed, Recipient ID, Project Number, Amend., ALI, and Project Status. Entering only the first part of a project number will yield search results of all projects that begin with the partial number entered in the Project Number query field.
3. Click on the **Submit Query** button.

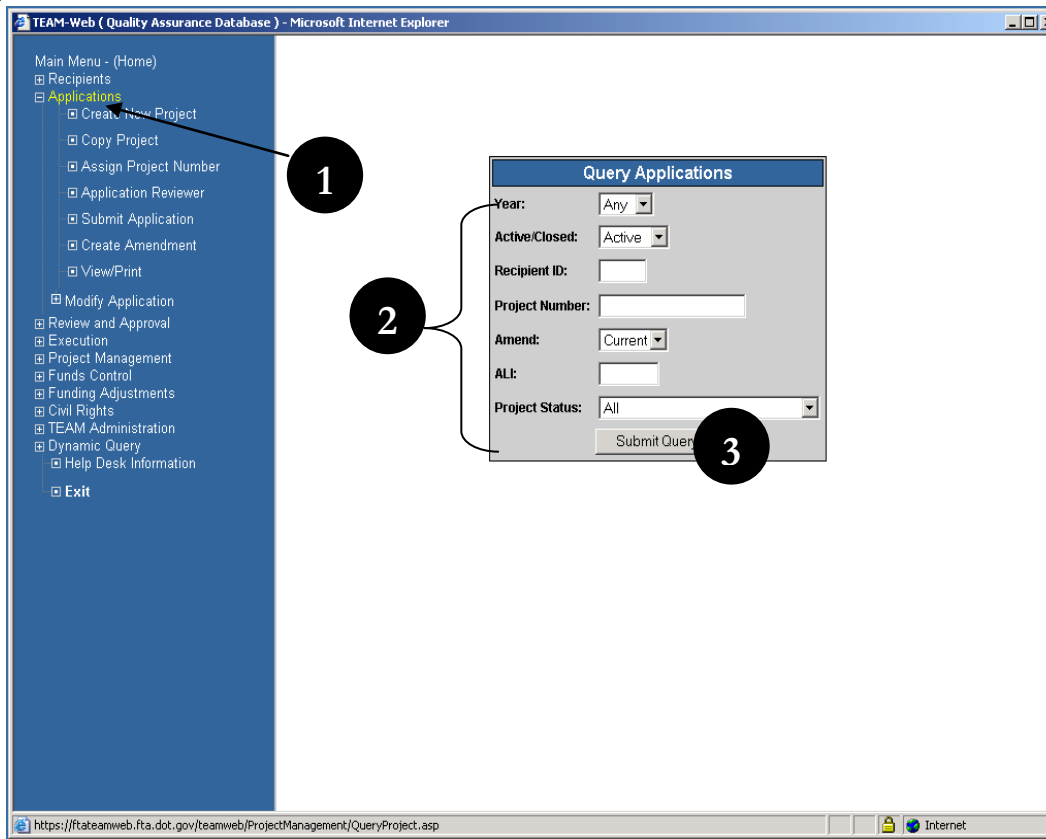


Figure 12

Continue with Figure 13 Below:

4. The Project Query Results page will appear. The page is organized much like the Recipients Query Results page. A list of results matching your search criteria will appear at the top while Project Details for the highlighted project will appear in the gray portion of the page at the bottom of the screen.
5. To view Project Details for a specific project, highlight that project in the Results table by clicking on it. The details will populate in the Project Details portion of the screen.
6. The **Project Details** include the following: Project Number, Application Type, Entered (Date), Recip. Type, FTA Manager, Status, Description, Recipient, Cost Center, Submitted, Awarded, Executed, FTA Amount, Total Elig. Cost



Project Query Results

| Project Number | Description | Rev. |
|-----------------|---|------|
| #2 REQUESTED | Carsharing/Carpooling | 0 |
| 03 | W.H.A.T. Terminal Project | 0 |
| 1 | Bus and Bus-Related Equipment | 0 |
| 100903 | Cherokee County Vanpool Program | 0 |
| 1111 | Operating Funds | 0 |
| 1174 | OVER-THE-ROAD BUS ACCESSIBILITY | 0 |
| 16602 | Trolley, Shelters, Fuel System, Paving | 0 |
| 2 | Community marketing and public education | 0 |
| 2003-04 CAPITAL | Purchase Rolling Stock and Related Equip. | 0 |
| 2003CA-1 | Capital projects | 0 |
| 2004 5307 | 5309 Capital Grant | 0 |
| 2004 5307 OPER. | Operations and Capital | 0 |
| 2004 5309 | Operating Expenses for 2004 | 0 |
| 2004PROJRENEWAL | Purchase of Rolling Stock | 0 |
| 2116-04 | JARC - Project Renewal Grant | 0 |
| 5555 | Operating assistance | 0 |
| 6362-2004 | FY 2004 OPERATING AND CAPITAL ASSISTANCE | 0 |
| 999999 | wheelchair lift | 0 |
| AK-03-0037-02 | FY 2004 Operating Assistance - Bus | 0 |
| | Port Mackenzie Const Ferry Lndos/Tml | 0 |

Project Details

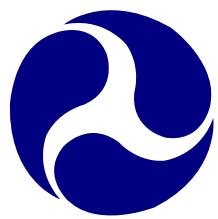
| | | | |
|-------------------|--|-------------------|--------|
| Project Number: | FY2004 | Cost Center: | 789-00 |
| Application Type: | Electronic | Submitted: | |
| Entered: | 10/20/2003 | Awarded: | |
| Recip. Contact: | VILMA WARNER | Executed: | |
| FTA Manager: | | FTA Amount: | \$0.00 |
| Status: | Pending Submission/App. in Development | Total Elig. Cost: | \$0.00 |
| Description: | | | |
| Recipient: | 6264 - CITY OF MADERA | | |

Query Results:
Displays all applications retrieved from the database using your search criteria. Click on an application to select it.

Project Information:
This area is used to display information for the application selected in the Query Results Table.

Figure 13

Note: Use the scroll bar at the side of the Query Results list to scroll through the projects returned through your query. If a “next” button appears above the list, click on it to view the results page-by-page.



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